



Putnam Consulting Group

Confident Giving • Dramatic Return

20 Ways a Consultant Can Make Your Life Easier

A Little Outside Help Goes a Long Way

You and your staff can probably, collectively, leap tall buildings in a single bound. But you might not be able—or willing—to tackle every single need that presents itself to your organization. It might be time to hire a consultant. You only have so much time, and sometimes you need a new perspective and a helping hand from someone with an unbiased view and different expertise. If you are wondering just how much help consultants can be, here are 20 ways they can make your life easier.

1. Perform needs assessments

The more ingrained we get in our work, the harder it is to see the big picture of our organization's real needs. We may think we need a new grantmaking strategy or an update of our vision, but do we really? A strategic consultant can provide you with an overview of your organization and your work and help you determine where you have real gaps and where you need to make strategic change.

2. Conduct environmental scans

It would be great to know who else is doing similar work to yours, so you can best complement one another rather than unwittingly compete. And we would all like to know what major new developments are afoot in our field. But you simply don't have time to do the research necessary. A research consultant may be the best resource for you to learn more about who is doing what work, what's working, and what changes are on the horizon.

3. Research grantmaking strategies

If you are in the habit of making grants the same way you have for years, it might just be time to take a look at some new grantmaking strategies. Do you need to rethink your mission? The types of grants you make? The grant size? Or the region in which you make grants? All these questions can be overwhelming. Hiring a consultant to help you research and rethink the best ways to use your funds can help you see financial and organizational benefits now and in the future.

4. Advise on program development

A consultant with a particular area of expertise—education, grassroots advocacy, mental health, etc.—may provide you with the support you need as you create and grow your foundation's programs. You are the expert on your foundation, your community, your strategy. Let a consultant be the expert on the program details. This will help you build a better program, and having an expert's knowledge and support will help you raise your foundation's status as a go-to resource for that topic.

5. Review proposals

When you put out a request for proposals, you get proposals back. Do you really have the time to read and carefully consider each one? Strategic grantmaking requires more than just a scan of proposals. Hiring one or two consultants to read proposals and provide you with the strongest candidates can save you time and ensure you are making the best decisions for your grantmaking dollars.



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6. Conduct site visits

Conducting site visits helps build relationships and ensure that your grantmaking dollars are going to the grantees who will put them to the best use. Unfortunately, scheduling conflicts and lack of time often get in the way of a good site visit. Hiring someone to organize and conduct site visits ensures that potential and current grantees are given the time and attention they deserve, and, in return, you receive an unbiased report of the site visit results. This is a win-win for everyone involved.

7. Coordinate the entire review process

For larger grantmaking programs, managing the flow of hundreds of applications and narrowing them down to finalists can be overwhelming. A consultant can help you orchestrate a system for review, including gathering and coordinating individual reviewers, answering applicant questions, and coordinating site visits among finalists. That means you can concentrate on overall supervision and review only the most promising applications.

8. Help with organizational development

Board development, staff development, administrative needs, technical support. Where do you begin when it comes to organizational development for your foundation? An expert can help you build your board strategically, provide staff training where necessary, and offer technical support and administrative cost-cutting techniques. By bringing in an efficiency expert, or several experts with different skills, you will see stronger short-term and long-term changes within your organization.

9. Explore ideas for new foundations

Are you considering creating a new foundation? Do you have an idea for integrated health care, academic changes, or social justice programs for which you see funding gaps? Before you contact an attorney to get started on creating your new foundation, bring someone on board to see what the real needs are, where someone else might be doing similar work, and what changes need to be made to current funding and programs. An investment on the front end will save you time and legal fees down the road.

10. Assist with ongoing management

Do you need help with day-to-day tasks that have become overwhelming because of unforeseen circumstances or because you have hit the “busy season”? Bringing someone in temporarily to help review proposals or respond to applicant questions, or to help you get reorganized is a great use of financial resources. Your investment in project support ensures a seamless and professionally run organization.

11. Facilitate board and staff retreats

A half-day, full-day, or multiday retreat is challenging at best. Covering fund-raising, grantmaking strategy, general operational business, and more requires an outsider. A retreat facilitator will create an agenda that ensures that you are covering the right topics, keep participants on track and out of “rabbit holes,” listen for common themes and concerns, and, in the end, help you create and implement a strategy for the future. A great facilitator is one person you always want to consider for your team.



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12. Negotiate multigenerational dynamics for family philanthropies

When you run a family philanthropy, there is no way around family dynamics getting into the mix. Unlike other businesses and philanthropies, at the end of the day, you don't get to walk away from the relationship challenges of a family endeavor. Keep the personal conflicts out of your business and homes by hiring a consultant to help negotiate the communication efforts and philanthropic challenges when your family's generations and personalities conflict.

13. Guide succession planning

Both family philanthropies and other foundations face inevitable changes in leadership. The key is to be well prepared before transition occurs and to plan for it carefully, sensitively, and professionally. Hiring a consultant who specializes in succession planning will help you avoid interpersonal conflict and give everyone a clear, common vision of how your foundation's leadership will evolve.

14. Help with leadership development and coaching

When you are responsible for making big decisions, you are perceived as a leader in your organization, in your community, and in your field. Make sure that your words and actions match your leadership role. A good leadership coach will help you outline your goals and ensure that you are able to communicate clearly and effectively, garner support from other leaders, and galvanize others to build community and make change.

15. Conduct executive searches

When you are ready to hire an executive staff member, the legwork involved in getting to the right executives and screening individuals is challenging. Aside from the time involved, you may be looking at a pool of executives with whom you already have relationships and who need to ensure discretion is a priority in discussions. Working with an executive search firm to handle initial discussions may be a great option for executive-level hiring.

16. Perform evaluations

When you are close to your grantmaking work and care passionately about it, it can be difficult to be objective. Yet scientific and objective evaluations may be key to sustaining investment in your program over the long term. An outside evaluation consultant can provide a clear, unbiased picture of your program's effectiveness and help you recognize successes, anticipate upcoming challenges, and make plans for improvement that will enhance sustainability. On the flip side, a good evaluation can also show that other investments may be more fruitful for your foundation.

17. Develop marketing communications

Communication and marketing strategy require communication and marketing experts. Often we think we can create a communications plan for an initiative, handle media relations, develop a budget, and create a compelling visual campaign. What we end up with is a weak effort made weaker by our lack of time and expertise, and finances that are squandered. A good communications consultant is going to save you time and, ultimately, provide you with a financial savings.



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18. Strengthen your brand

Whether you know it or not, your foundation has a brand and an image. An expert branding consultant will help you decide what the brand will be and how it will be projected, rather than allowing uncoordinated internal actions or outside forces to shape your image. Once you have developed a clear brand and brand strategy, you'll find it enhances every aspect of your programmatic and communications work.

19. Provide legal or financial advice

Some situations simply require a consultant, no questions asked. When you need financial advice or legal expertise, you need a finance professional or an attorney. With all of the loopholes and unknowns in these areas, you never want to risk taking a chance or making a mistake that can be financially draining or devastating to your organization's reputation. Hire an attorney or financial advisor/CPA with expertise in philanthropy and the nonprofit sector.

20. Explore new funding

Does your foundation need new resources for funding options? Have you tapped your usual businesses, community partners, and donors? Where can you find new financial resources? There are people who are devoted to finding you new revenue streams. They already have ideas that you haven't considered, and they can research more. Let them partner with you to learn your needs and share what is out there with you. They may even be able to make introductions for you, to make the first meeting a little easier.

Consultants can assist your foundation or nonprofit in just about any aspect of your work. Bringing one on board may be the best decision you make today. Think about where you might need some new views or a person who can devote more time to a project. And then do some research about consultants who have what you need. Explore the list of vetted consultants at the National Network of Consultants to Grantmakers (<http://nncg.org>) and ask other foundations or trusted partners about whom they used. By developing a list of potential consultants now, you will save yourself valuable time when you need one in the future.

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